

THE
UNIVERSITY
OF RHODE ISLAND
DIVISION OF
ADMINISTRATION
AND FINANCE

THINK BIG  WE DO™

PURCHASING DEPARTMENT
581 Plains Road, Suite 3, Kingston, RI 02881 USA p: 401.874.2171 f: 401.874.2306 url.edu/purchasing



BID/PROPOSAL

COMMODITY: COURSE MANAGEMENT SOFTWARE FOR OLLI PROGRAM DATE: 7/7/2015

FORMAL BID NO. _____ PUBLIC BID NO. _____ RFP NO. 7063

BIDS ARE TO BE RECEIVED IN URI PURCHASING DEPARTMENT BY: DATE: 7/28/2015 TIME: 3:00 PM

BUYER: DEBRA LEE/rlc  SURETY REQUIRED: YES: _____ NO: X

PRE-BID/PROPOSAL CONFERENCE: DATE: _____ TIME: _____

MANDATORY: YES: _____ NO: _____

LOCATION: _____

BE SURE ALL INFORMATION SHOWN BELOW IS CORRECT.
FEDERAL EMPLOYER IDENTIFICATION NUMBER MUST BE INCLUDED.

COMPANY NAME: _____ FEIN: _____

STREET AND NUMBER: _____

CITY, STATE & ZIP CODE: _____

ORDERING E-MAIL ADDRESS: _____

**No offer will be considered that is not accompanied by the attached
University of Rhode Island Bidder Certification Form/Contract Offer
completed and signed by the offeror.**

Print Name and Title

Telephone Number/Facsimile Number

Signature

Date

Company F.E.I.N.

THIS BID WILL NOT BE HONORED UNLESS SIGNED

The University of Rhode Island is an equal opportunity employer committed to the principles of affirmative action.

University of Rhode Island Bidder Certification Form

ALL OFFERS ARE SUBJECT TO THE REQUIREMENTS, PROVISIONS AND PROCEDURES CONTAINED IN THIS CERTIFICATION FORM. Offerors are expected to read, sign and comply with all requirements. Failure to do so may be grounds for disqualification of the offer contained herein.

Rules for Submitting Offers

This Certification Form must be attached in its entirety to the front of the offer and shall be considered an integral part of each offer made by a vendor to enter into a contract with the University of Rhode Island. As such, submittal of the entire Bidder Certification Form, signed by a duly authorized representative of the offeror attesting that he/she (1) has read and agrees to comply with the requirements set forth herein and (2) to the accuracy of the information provided and the offer extended, is a mandatory part of any contract award.

To assure that offers are considered on time, each offer must be submitted with the specific Bid/RFP/LOI number, date and time of opening marked in the upper left hand corner of the envelope. Each bid/offer must be submitted in separate sealed envelopes.

A complete signed (in ink) offer package must be delivered to the University of Rhode Island Purchasing Office by the time and date specified for the opening of responses in a sealed envelope.

Bids must be submitted on the URI bid solicitation forms provided, indicating brand and part numbers of items offered, as appropriate. Bidders must submit detailed cuts and specs on items offered as equivalent to brands requested WITH THE OFFER. Bidders must be able to submit samples if requested.

Documents misdirected to other State locations or which are not present in the University of Rhode Island Purchasing Office at the time of opening for whatever cause will be deemed to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the University of Rhode Island Purchasing Office. Postmarks shall not be considered proof of timely submission.

RIVIP SOLICITATIONS. To assure maximum access opportunities for users, public bid/RFP solicitations shall be posted on the RIVIP for a minimum of seven days and no amendments shall be made within the last five days before the date an offer is due. Except when access to the Web Site has been severely curtailed and it is determined by the Purchasing Agent that special circumstances preclude extending a solicitation due date, requests to mail or fax hard copies of solicitations will not be honored. When the result of an Internet solicitation is unsuccessful, the University of Rhode Island will cancel the original solicitation and resolicit the original offer directly from vendors.

PRICING. Offers are irrevocable for sixty (60) days from the opening date (or such other extended period set forth in the solicitation), and may not be withdrawn, except with the express permission of the University Purchasing Agent. All pricing will be considered to be firm and fixed unless otherwise indicated. The University of Rhode Island is exempt from Federal excise taxes and State Sales and Use Taxes. Such taxes shall not be included in the bid price. PRICES QUOTED ARE FOB DESTINATION.

DELIVERY and PRODUCT QUALITY. All offers must define delivery dates for all items; if no delivery date is specified, it is assumed that immediate delivery from stock will be made. The contractor will be responsible for delivery of materials in first class condition. Rejected materials will be at the vendor's expense.

PREVAILING WAGE, OSHA SAFETY TRAINING and APPRENTICESHIP REQUIREMENTS. Bidders must comply with the provisions of the Rhode Island labor laws, including R.I. Gen. Laws §§ 37-13-1 et seq. and occupational safety laws, including R.I. Gen. Laws §§ 28-20-1 et seq. These laws mandate for public works construction projects the payment of prevailing wage rates, the implementation and maintenance of occupational safety standards, and for projects with a minimum value of \$1 Million, the employment of apprentices. The successful Bidder must submit certifications of compliance with these laws from each of its subcontractors prior to their commencement of any work. Prevailing wage rates, apprenticeship requirements, and other workforce and safety regulations are accessible at www.dlt.ri.gov.

PUBLIC RECORDS. Offerors are advised that all materials submitted to the University for consideration in response to this solicitation will be considered without exception to be Public Records pursuant to Title 38 Chapter 2 of the Rhode Island General Laws, and will be released for inspection immediately upon request once an award has been made. Offerors are encouraged to attend public bid/RFP openings to obtain information; however, bid/RFP response summaries may be reviewed after award(s) have been made by visiting the Rhode Island Vendor Information Program (RIVIP) at www.purchasing.ri.gov, Solicitation Opportunities +, Other Solicitation Opportunities or appearing in person at the University of Rhode Island Purchasing Office Mondays through Fridays between 8:30 am – 3:30 pm. Telephone requests for results will not be honored. Written requests for results will only be honored if the information is not available on the RIVIP.

Award will be made to the responsive and responsible offeror quoting the lowest net price in accordance with specifications, for any individual item(s), for major groupings of items, or for all items listed, at the University's sole option.

BID SURETY. Where bid surety is required, bidder must furnish a bid bond or certified check for 5% of the bid total with the bid, or for such other amount as may be specified. Bids submitted without a required bid surety will not be considered.

SPECIFICATIONS. Unless specified "no substitute", product offerings equivalent in quality and performance will be considered (at the sole option of the University) on the condition that the offer is accompanied by detailed product specifications. Offers which fail to include alternate specifications may be deemed nonresponsive.

VENDOR AUTHORIZATION TO PROCEED. When a purchase order, change order, contract/agreement or contract/agreement amendment is issued by the University of Rhode Island, no claim for payment for services rendered or goods delivered contrary to or in excess of the contract terms and scope shall be considered valid unless the vendor has obtained a written change order or contract amendment issued by the University of Rhode Island Purchasing Office PRIOR to delivery.

Any offer, whether in response to a solicitation for proposals or bids, or made without a solicitation, which is accepted in the form of an order OR pricing agreement made in writing by the University of Rhode Island Purchasing Office, shall be considered a binding contract.

REGULATIONS, GENERAL TERMS AND CONDITIONS GOVERNING STATE AND BOARD OF GOVERNORS FOR HIGHER EDUCATION CONTRACTS. This solicitation and any contract or purchase order arising from it are issued in accordance with the specific requirements described herein, and the State's Purchasing Laws and Regulations and other applicable State Laws, including the Board of Governors for Higher Education General Terms and Conditions of Purchase. The regulations, General Terms and Conditions are incorporated into all University of Rhode Island contracts and can be viewed at: www.ribghe.org/procurementregs113006.pdf and www.purchasing.ri.gov.

ARRA SUPPLEMENTAL TERMS AND CONDITIONS. Contracts and sub-awards funded in whole or in part by the American Recovery and Reinvestment Act of 2009, Pub.L.No. 111-5 and any amendments thereto, such contracts and sub-awards shall be subject to the Supplemental Terms and Conditions for Contracts and Sub-awards funded in whole or in part by the American Recovery and Reinvestment Act of 2009, Pub.L.No. 111-5 and any amendments thereto located on the Division of Purchases website at www.purchasing.ri.gov.

EQUAL EMPLOYMENT OPPORTUNITY. Compliance certificate and agreement procedures will apply to all awards for supplies or services valued at \$10,000 or more. Minority Business Enterprise policies and procedures, including subcontracting opportunities as described in Title 37 Chapter 14.1 of the Rhode Island General Laws also apply.

PERFORMANCE BONDS. Where indicated, successful bidder must furnish a 100% performance bond and labor and payment bond for contracts subject to Title 37 Chapters 12 and 13 of the Rhode Island General Laws. All bonds must be furnished by a surety company authorized to conduct business in the State of Rhode Island. Performance bonds must be submitted within 21 calendar days of the issuance of a tentative notice of award.

DEFAULT and NON-COMPLIANCE Default and/or non-compliance with the requirements and any other aspects of the award may result in withholding of payment(s), contract termination, debarment, suspension, or any other remedy necessary that is in the best interest of the state/University of Rhode Island.

COMPLIANCE Vendor must comply with all applicable federal, state and local laws, regulations and ordinances.

SPRINKLER IMPAIRMENT AND HOT WORK. The Contractor agrees to comply with the practices of the State's Insurance carrier for sprinkler impairment and hot work. Prior to performing any work, the Contractor shall obtain the necessary information for compliance from the Risk Management Office at the Department of Administration or the Risk Management Office at the University of Rhode Island.

Each bid proposal for a *public works project* must include a "public copy" to be available for public inspection upon the opening of bids. **Bid Proposals that do not include a copy for public inspection will be deemed nonresponsive.**

For further information on how to comply with this statutory requirement, see R.I. Gen. Laws §§ 37-2-18(b) and (j). Also see State of Rhode Island Procurement Regulation 5.11 at <http://www.purchasing.ri.gov/rulesandregulations/rulesAndRegulations.aspx>

ALL CONTRACT AWARDS ARE SUBJECT TO THE FOLLOWING DISCLOSURES & CERTIFICATIONS

Offerors must respond to every disclosure statement. A person authorized to enter into contracts must sign the offer and attest to the accuracy of all statements.

Indicate Yes (Y) or No (N):

___1 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been subject to suspension or debarment by any federal, state, or municipal government agency, or the subject of criminal prosecution, or convicted of a criminal offense with the previous five (5) years. If so, then provide details below.

___2 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has had any contracts with a federal, state or municipal government agency terminated for any reason within the previous five (5) years. If so, then provide details below.

___3 State whether your company or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been fined more than \$5000 for violation(s) of Rhode Island environmental laws by the Rhode Island Department of Environmental Management within the previous five (5) years. If so, then provide details below.

___4 I/we certify that I/we will immediately disclose, in writing, to the University Purchasing Agent any potential conflict of interest which may occur during the course of the engagement authorized pursuant to this contract.

___5 I/we acknowledge that, in accordance with (1) Chapter §37-2-54(c) of the Rhode Island General Laws "no purchase or contract shall be binding on the state or any agency thereof unless approved by the Department [of Administration] or made under general regulations which the Chief Purchasing Officer may prescribe," and (2) RIGL section §37-2-7(16) which identifies the Board of Governors for Higher Education as a public agency and gives binding contractual authority to the University Purchasing Agent, including change orders and other types of contracts and under State Purchasing Regulation 8.2.1.1.2 any alleged oral agreement or arrangements made by a bidder or contractor with any agency or an employee of the University of Rhode Island may be disregarded and shall not be binding on the University of Rhode Island.

___6 I/we certify that I or my/our firm possesses all licenses required by Federal and State laws and regulations as they pertain to the requirements of the solicitation and offer made herein and shall maintain such required license(s) during the entire course of the contract resulting from the offer contained herein and, should my/our license lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

___7 I/we certify that I/we will maintain required insurance during the entire course of the contract resulting from the offer contained herein and, should my/our insurance lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

___8 I/we certify that I/we understand that falsification of any information herein or failure to notify the University of Rhode Island Purchasing Agent as certified herein may be grounds for suspension, debarment and/or prosecution for fraud.

___9 I/we acknowledge that the provisions and procedures set forth in this form apply to any contract arising from this offer.

___10 I/we acknowledge that I/we understand the State's Purchasing Laws (§37-2 of the General Laws of Rhode Island) and Purchasing Regulations and General Terms and Conditions available at the Rhode Island Division of Purchases Website (<http://www.purchasing.ri.gov>) and the Board of Governors Website (www.ribghe.org/procurementregs113006.pdf) apply as the governing conditions for any contract or purchase order I/we may receive from the University of Rhode Island, including the offer contained herein.

___11 I/we certify that the bidder: (i) is not identified on the General Treasurer's List, created pursuant to R.I. Gen. Laws § 37-2.5-3, as a person or entity engaging in investment activities in Iran described in § 37-2.5-2(b); and (ii) is not engaging in any such investment activities in Iran.

___12 If the product is subject to Department of Commerce Export Administration Regulations (EAR) or International Traffic in Arms Regulations (ITAR), please provide the Export Control Classification Number (ECCN) or the US Munitions List (USML) Category: _____

___13 I/we certify that the above information is correct and complete.

IF YOU HAVE ANSWERED "YES" TO QUESTIONS #1 – 3 OR IF YOU ARE UNABLE TO CERTIFY YES TO QUESTIONS #4 – 11 and 13 OF THE FOREGOING, PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

Signature below commits vendor to the attached offer and certifies (1) that the offer has taken into account all solicitation amendments, (2) that the above statements and information are accurate and that vendor understands and has complied with the requirements set forth herein.

Vendor's Signature: _____ Bid Number: _____ Date: _____
(Person Authorized to enter into contracts; signature must be in Ink) (if applicable)

Print Name and Title of Company official signing offer Telephone Number _____

THE UNIVERSITY OF RHODE ISLAND

Solicitation Information

RFP NO. 7063

TITLE: Course Management Software for OLLI Program

OPENING DATE AND TIME: 7/28/15 @ 3:00pm

PRE-BID/ PROPOSAL CONFERENCE: No

Questions concerning this solicitation may be e-mailed to , URI Purchasing Department, at URIPurchasing@uri.edu no later than 7/14/15 @ 3:00pm (Eastern Time). Please reference RFP No.7063 on all correspondence.

SURETY REQUIRED: No

BOND REQUIRED: No

Name of URI Buyer: Debra Lee

Title of Buyer URI Assistant Purchasing agent

NOTE TO VENDORS:

Offers received without the entire completed University of Rhode Island Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

SECTION 1 – INSTRUCTIONS AND NOTIFICATIONS TO OFFERERS:

The Rhode Island Board of Education/University of Rhode Island is soliciting proposals for a computer system software and one time license with annual subscription capable of managing membership / class enrollment for the OLLI Program (Osher Lifelong Learning Institute) from qualified OFFERORS, and in accordance with the terms of this Request for Proposal and the Board of Governors General Terms and Conditions of Purchase which may be obtained at: <http://www.ribghe.org/procurementregs113006.pdf> . The initial contract period will be a 12 months with option to extend for an additional 5 years.

This is a Request for Proposals, not an Invitation for Bid: responses will be evaluated on the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the University of Rhode Island Purchasing Department pursuant to the request, other than to name those offerors who have submitted proposals.

The scope of work is described herein.

Potential offerors are advised to review all sections of this solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content shall be borne by the offerer. The University assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the University of Rhode Island Purchasing Agent.

All pricing submitted is to be considered fixed, unless otherwise indicated herein.

Proposals misdirected to other University locations or which are otherwise not present in the University of Rhode Island Purchasing Department at time of opening for any cause will be determined to be late and will not be considered. For the purpose of this requirement, the official time and date shall be that of the time clock in the reception area of the URI Purchasing Department.

It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontractors are permitted, provided that their use is clearly indicated in the vendor's proposal, and the subcontractor(s) to be used is identified in the proposal.

The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

Vendors are advised that all materials submitted to the University of Rhode Island for consideration in response to this RFP will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1
Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Opportunity Office at (401) 222-3090.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the selected vendor(s).*

The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator at (401) 574-8253 or visit the website www.mbe.ri.gov or contact charles.newton@doa.ri.gov.

The University reserves the right to award to one or more offerers. The University also reserves the right to award this project based on pricing alone.

SECTION 2 – SCOPE OF WORK

Background and Purpose:

Intent:

The Osher Lifelong Learning (OLLI) Institute within the University of Rhode Island (URI) is seeking proposals for a Web-based computer software system capable of managing all membership, course registrations, course management, and associated financial management, with reporting as needed for the effective control of an operation characterized by constantly changing activity.

General Description:

The OLLI program at URI is one of approximately 120 OLLI programs at universities and colleges in all 50 states. All Olli programs are similar in that they involve non-credit, educational programs specifically designed for seasoned adults aged 50 and older; strong support from the leadership of the university or college; a diverse repertoire of intellectually stimulating courses; robust volunteer leadership; established mechanisms for evaluating participant satisfaction with educational offerings; and sound organizational structure. The OLLI program at URI, started in 2009, is a typical Olli program; it has over 1000 members, mostly seniors, who select courses of 1-8 days class sessions. Approximately 60

courses are available in semester formats year round. Most classes take place in a classroom setting at the university, although field trips/bus trips are popular. Faculty consists primarily of seniors with a particular expertise or interest who are happy to share their knowledge. A challenge does exist in that the OLLI membership community is not as computer literate / Web active as younger groups today; computer skills beyond email may be lacking.

Currently most of the logistics of managing the membership and registrations, along with payments, is performed on single user spreadsheets; members have on line access to course information and may join, but cannot register for classes.

OLLI/URI wishes to acquire/license a multi-user, Web-based management system for use by members and staff to execute those routine actions involved in a typical membership based enrollment system, including registration, payment for membership and course fees, plus course management, and reporting and control programs. The ideal vendor candidate for URI/OLLI will have demonstrated successful implementation of a software program with *another Lifelong Learning Program*.

Specifics are described below.

Specific Requirements:

1. System Features – Membership Management :

- a. Multi user Web based access from any Web enabled location 24/7 by the general public, and secure, controlled access by staff for management functions. Ease of access and understanding is imperative for this primarily senior group.
- b. Ability to join or renew using credit card that interfaces with URI payment system. URI has a PCI compliance gateway for credit card processing that performs all credit card related tasks (validity, over credit line, etc) for a number of organizations within the University, crediting the organization's accounts on payments as well as payment type information. URI /OLLI already uses this gateway for member enrollment, and would like to continue the existing capability but expanded to include class enrollment as well, and in a fashion that permits membership sign-up and class enrollment (for multiple courses) at a single sitting.
- c. Ability of staff to manually register and renew memberships, via check payment.
- d. Prevention of course registration unless a member
- e. Capability of member to edit their member profile in addition to accessing transaction history, current registrations and wait lists.
- f. Email confirmation of membership upon enrollment
- g. Email notification of "about to expire"
- h. Management reporting on memberships paid within dates selected, "did not renew"
- i. Ability to peruse catalog as a non- member
- j. Ability to provide a paid membership for instructors who elect a "free membership" option in lieu of a stipend.

2. System Features – Course Descriptions and Management (Office function only)

- a. Course selection at URI/OLLI is based on a quality semester catalog that is prepared 2-3 months prior to the semester. The catalog is published in hard copy and mailed to members; concurrently an exact version of the catalog must be available on line. The preferred approach is to have the course narrative/description information entered into the course management component of the system, from which the catalog can be easily printed.

- b. Ability to add / delete / revise course information

3. System Features – Class enrollment and management

- a. Web access 24/7 to course information with ability to enroll if membership valid, “need to join” message if attempt made w/o membership.
- b. Ability to join and enroll in classes at 1 sitting, including multiple classes. Summarization of charges with one card payment that interfaces with URI payment system
- c. Email confirmation of registrations
- d. Ability, if class is full, to be placed on “wait list” status if requested for course with subsequent notification of availability. (notification possibly an office function)
- e. Faculty / instructor links to courses included with course descriptions
- f. Ability of staff to refund credit card registrations.
- k. Ability of staff to manually register for course enrollment via check payment.
- l. Ability to register for non-class type activity – dinners,
- m. Single point dashboard navigation on the selections of routine reporting (eg class rosters, daily receipts) with selection parameters.
- n. Ability to review members who have been “wait-listed” with random lottery method for selection and notification when space becomes available.

4. Instructor / Classroom management

Olli faculty members include both members of Olli and non-members, and include trained professionals (teachers, URI faculty) as well as individuals who are comfortable leading a class or preparing a lecture on subjects where they have expertise. Courses are proposed (on any topic) by the potential faculty member in a course proposal format and then approved or rejected by a course evaluation committee. Faculty may be paid a small stipend, or in lieu of the stipend may receive a free membership.

- a. Comprehensive information on faculty members to include name, contact info, email, phone, and brief bios.
- b. Faculty history – courses taught date and data etc
- c. Ability of faculty member to email students (within date window)
- d. Rosters, room assignments, class reminders with welcome; class setup parameters

5. Financial reporting

- a. Daily/weekly/monthly reporting of receipts by type of payment
- b. Refund capability for credit card payments
- c. Ability to support financial auditing requirements with receipts/cancellation data

6. Ongoing Support

- a. Unlimited customer support.
- b. Ability for comprehensive training after initial install. (During license period - eg OLLI personnel change)

General Scope of Work to be performed:

1. Conversion/Installation

- a. Upload and pre-populate membership profiles from existing Excel data bank of up to 1500 member records. Plan for converting existing records into initial database, including spreadsheets – methodology.

- b. Project management / management reviews, to consist of weekly status/project reviews between OLLI team leader and vendor team leader and technical review committee as needed, with bi weekly review with OLLI director. Weekly report to be in writing and will address schedule attainment status, and critical issues to be addressed, along with specific assigned tasks.
2. Training
 - a. Defined plan to include description of training, recommended schedule, and hours of training included.
 - b. Vendor staff to be assigned as well as secondary / backup personnel available.
 - c. Defined methodology – use of test files, on line vs in-house class
3. Full Implementation and follow-up
 - a. Vendor recommendations on rollout announcements and methodology.
 - b. Vendor support during this critical period.
 - c. Response if problems occur / repositioning.
 - d. Awareness of and options to use upgrades to system.
 - e. Ability to receive system upgrades free of charge during license period

Project Key Components (Critical Success Factors)

1. Demonstrating that software package will meet defined needs as outlined above.
2. A training plan that is acceptable to OLLI management in that it provides minimal impact on ongoing operations. The training should be scheduled at a time when course activity is lower (eg between semesters) and when both paid staff and planned volunteers can be available. Training should be scheduled so that rollout can occur in the following semester and must include a fallback plan as well as a partial rollout. A timeline with dates must be established and agreed once award is made for this RFP.
3. Technical support during introduction/rollout

SECTION 3 TECHNICAL PROPOSAL

Responses will be evaluated in two parts. Part one will require the technical submission and will be evaluated on the following criteria:

The Technical Proposal must contain the following sections:

1. Executive Summary

The Executive Summary is intended to highlight the contents of the Technical Proposal and to provide University evaluators with a broad understanding of the offeror's technical approach and ability.

2. Capability, Capacity, and Qualifications of the Offeror

This section shall include identification of all staff and/or subcontractors proposed as members of the project team, and the duties, responsibilities, and concentration of effort which apply to each (as well as resumes, curricula vitae or statements of prior experience and qualification).

3. Work Plan/Approach Proposed

This section shall describe the offeror's understanding of the University's requirement, including the result(s) intended and desired, the approach and/or methodology to be employed and a work plan for accomplishing the results proposed. The description of approach shall discuss and justify the approach proposed to be taken for each task, and the technical issues that will or maybe confronted at each stage on the project. The work plan description shall include a detailed proposed project schedule (by task and subtask), a list of tasks, activities, and/or milestones that will be employed to administer the project, the assignment of staff members and concentration of effort for each, and the attributable deliverables for each and will identify and describe what type of tutor training methodology will be utilized in the program.

4. Previous Experience and Background, including the following information:
 - i. A comprehensive listing of similar projects undertaken and/or similar clients served, including a brief description of the projects;
 - ii. A description of the business background of the offeror (and all subcontractors proposed), including a description of their financial position.
 - iii. A minimum of three references, including contact information and title that the University may contact directly. References must be from the clients of the bidding vendor, where the vendor provided a similar lifelong learning related web-based program for an OLLI organization.

SECTION 4 COST PROPOSAL

A separate, signed and sealed, Cost Proposal reflecting the fee structure proposed for this scope of service. Attached is an outline for specific fees/rates or requested breakdown.

PROPOSAL QUESTIONS & SUBMISSION

Questions concerning this solicitation may be e-mailed to the Purchasing Department at URIPurchasing@uri.edu no later than the time and date indicated on page 1 of this solicitation. Please reference the RFP No. on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

Offerors are encouraged to submit written questions to the University of Rhode Island Purchasing Department. **No other contact with University parties will be permitted.** Interested offers may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of Rhode Island Purchasing Department will not be considered.

Responses (**a original plus 5 copies**) should be mailed or hand-delivered in a sealed envelope marked "RFP # - 7063" to

MAIL TO:

UNIVERSITY OF RHODE ISLAND
PO BOX 1773
PURCHASING DEPARTMENT
PLAINS ROAD
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND
PURCHASING DEPARTMENT
581 PLAINS ROAD
KINGSTON, RI 02881-2010

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations or which are otherwise not presented in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The "official" time clock is located in the reception area URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

RESPONSE CONTENTS

Responses should include the following:

- A completed and signed URI Bidder Certification Form included with this proposal.
- A ***separate Technical Proposal*** (total number of copies indicated above) describing the background, qualifications, and experience with and for similar programs, as well as the work plan or approach proposed for this requirement.
- A single **separate, signed and sealed, Cost Proposal** reflecting the fee structure proposed for this scope of service.
- In addition to the multiple hard copies of the technical proposals required, Respondents are requested to provide their proposal in electronic format (CDRom, Diskette or flash drive). Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested.
- Printed copy of the SIG2015 completed questionnaire

SECTION 5 - EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee which will evaluate and score all proposals, using the following criteria. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

The University of Rhode Island reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

Proposals will be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff years of experience with software	5 points
Capability, Capacity and Qualifications of Offeror Prior experience with other OLLI programs.	15 points
Quality of Work Plan	15 Points
Suitability of Approach/Methodology	35 points
Total Possible Technical Points	70 Points
Cost calculated as lowest responsive cost proposal divided by (this cost proposal) times 30 points*	30 Points
Total Possible Points	100 Points

*The Low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

$$(\text{low bid} / \text{vendors bid}) * \text{Available points}$$

For example: If the low bidder (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly cost and service fee and the total points available are Thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 * 30 = 19.5$$

Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal.

CONCLUDING STATEMENTS

Notwithstanding the above, the University reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The University may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The Board's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP and can be found at the following <http://www.ribghe.org/procurementregs113006.pdf>

Information Security Questionnaire

The printed response to a SIG2015 Questionnaire (Standards Information Gathering questionnaire) must be submitted by each bidder with their bid response. This SIG 2015 response will be reviewed and approved for compliance by the Associate Director of Information Security prior to the technical review. SIG's that are not approved by the Director of Information Security will not proceed to the Technical Review. The SIG 2015 may be found at <https://security.uri.edu/forms/sig>.

INSURANCE

IN ACCORDANCE WITH THE BOARD OF GOVERNORS (BOG) FOR HIGHER EDUCATION GENERAL CONDITIONS OF PURCHASE, INSURANCE CERTIFICATES ARE REQUIRED FOR WORKERS COMPENSATION, GENERAL LIABILITY, PROPERTY DAMAGE AND AUTO INSURANCE. IN ADDITION WE REQUIRE CYBER LIABILITY INSURANCE (FOR PRIVACY & SECURITY INSURANCE) IN THE AMOUNT OF \$1MILLION PLUS A HOLD HARMLESS CLAUSE HOLDING THE UNIVERSITY OF RHODE ISLAND HARMLESS AGAINST ANY ACTIONS FOR BREACH OF VENDOR'S SOFTWARE DATA. UPON NOTICE OF TENTATIVE AWARD, THE SUCCESSFUL BIDDER(S) WILL BE REQUIRED TO SUBMIT THE ABOVE NAMING THE RHODE ISLAND BOARD OF EDUCATION , THE UNIVERSITY OF RHODE ISLAND, AND THE STATE OF RHODE ISLAND AS ADDITIONAL INSURED, BY A FIRM AUTHORIZED TO DO BUSINESS IN THE STATE OF RHODE ISLAND.

COST PROPOSAL FOR RFP 7063

1. Initial License Procurement (first 12 months) cost
\$_____

2. All Labor, Equipment and materials necessary to execute the conversion,
implementation and training for the new software as outlined within the
RFP7063 specifications \$_____

total cost \$_____

OPTIONAL:

3. First Year- 12 month extension cost
\$_____

4. Second year-12 month extension \$_____

5. Third Year- 12 month extension \$_____

6. Fourth Year- 12 month extension \$_____

7. Fifth Year -12 month extension \$_____

8. Phone Support cost in Excess of License Provisions \$_____ rate per hour

9. Training Costs for additional Hours after Installation \$_____ rate for one on-line session
\$_____ rate for one on-site session

Bidder must also submit Price List for upgrades that are made available to all users
(or a description of how the price for these upgrades is determined) plus an explanation as to
how "Ad Hoc" special software enhancements, beyond the basic package, costs would be determined.

RFP7063 Cost Proposal Review will be based on lines 1&2 combined.